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## **Poland**

### **Grain and Feed**

# **Polish Wheat Exports Higher Than Anticipated 2002**

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#### **Report Highlights:**

**Wheat export projections for MY 02/03 are increased because of higher than anticipated exports of government surplus stocks. Meanwhile, the grain production forecast has also slightly increased due to better than expected weather.**

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Includes PSD changes: Yes  
Includes Trade Matrix: No  
Unscheduled Report  
Warsaw [PL1], PL

Executive Summary .....	1
Wheat PS&D Table .....	2
Corn PS&D Table .....	3
Mixed Grain PS&D Table .....	4

## Executive Summary

We've increased our wheat export projection for MY 02/03 based on recent higher than anticipated sales of government held stocks for export. Per our latest Poland G&F Annual (PL 2010, 4/30/02) and voluntary on grain and meat sector government interventions (PL 2014, 6/14/02), the Polish government has been desperate to dispose of surplus government held wheat stocks to free up space for this year's crop. We also increased by 3.2 percent our total grain production estimate for 2002. Compared to our PL 2010 Grain and Feed Annual estimates, wheat production was increased 2 percent, corn 10 percent, and mixed grains 8.3 percent due to better than expected weather related growing conditions. Wheat and corn import estimates are unchanged from those submitted in PL 2010.

Sources indicate that 220,000 tons of wheat was sold to trading companies for export in a May/June tender. A previous tender for 25,000 tons of government held wheat for export occurred in February. One of the tender conditions was that the wheat could not be exported to the EU. This exclusion of exports to the EU may have been due to Poland's desire not to undercut its agricultural pre-accession agreements and current negotiating position regarding Poland's EU accession. Poland already somewhat weakened its position by delaying previously agreed to duty free access for EU grain for Jul-Sep.

The government is not officially providing export subsidies but did sell the wheat at a significant loss, because they paid higher prices for the wheat last season compared to current Polish market prices. Specific prices paid for the 220,000 wheat tender are unrevealed.

Trade sources indicate that 75,000 to 100,000 tons have been shipped through the end of June 2002. Virtually all was reportedly destined or in the process of being loaded for export to Brazil. At the beginning of June, 8,000 tons were shipped to Tunisia. We anticipate that a portion of the balance of the total 245,000 tons of government stocks sold for export will also be exported to Brazil, however, a significant portion is expected to be shipped to various African countries in MY 2002/03.

The Polish Plant Quarantine Service may well be issuing export certificates indicating that shipments are free of *Anguina tritici* (gall nematode), *Eurygaster integriceps*, *Alternaria trititica*, *Humenua cerealis* (cereal stripe), *Tilletia indica* (Karnal bunt), and *Urocystis agropyri* (flag smut).

In general, grain exports from Poland have been infrequent due to high local prices and quality problems. The last significant wheat exports were also from government held stocks: almost 400,000 tons exported in MY 1998/99 of which more than half was exported to S. Korea and nothing was exported to the EU.

Revised MY 2002/03 PSD tables for wheat, corn and mixed grains follow.



**Wheat PS&D Table**

PSD Table						
Country	Poland					
Commodity	Wheat				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	2635	2635	2627	2627	2550	2580
Beginning Stocks	1400	1168	1150	1094	950	1177
Production	8503	8503	9283	9283	9000	8900
TOTAL Mkt. Yr. Imports	856	830	300	300	400	300
Jul-Jun Imports	856	830	300	300	400	300
Jul-Jun Import U.S.	0	2	0	5	0	5
TOTAL SUPPLY	10759	10501	10733	10677	10350	10377
TOTAL Mkt. Yr. Exports	5	2	150	100	100	150
Jul-Jun Exports	5	2	150	100	100	150
Feed Dom. Consumption	4300	3900	4100	3900	3800	3750
TOTAL Dom. Consumption	9604	9405	9633	9400	9350	9250
Ending Stocks	1150	1094	950	1177	900	977
TOTAL DISTRIBUTION	10759	10501	10733	10677	10350	10377

**Corn PS&D Table**

PSD Table						
Country	Poland					
Commodity	Corn				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	152	152	224	224	200	200
Beginning Stocks	175	275	280	285	442	317
Production	923	923	1362	1362	1100	1100
TOTAL Mkt. Yr. Imports	335	470	100	100	100	200
Oct-Sep Imports	222	470	100	100	100	200
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1433	1668	1742	1747	1642	1617
TOTAL Mkt. Yr. Exports	3	3	0	0	0	0
Oct-Sep Exports	3	3	0	0	0	0
Feed Dom. Consumption	1050	1300	1200	1350	1300	1320
TOTAL Dom. Consumption	1150	1380	1300	1430	1400	1400
Ending Stocks	280	285	442	317	242	217
TOTAL DISTRIBUTION	1433	1668	1742	1747	1642	1617

**Mixed Grain PS&D Table**

PSD Table						
Country	Poland					
Commodity	Mixed Grain				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	2173	2173	2309	2309	2200	2250
Beginning Stocks	400	200	300	98	948	946
Production	4985	4985	6758	6758	6000	6540
TOTAL Mkt. Yr. Imports	0	3	0	0	0	0
Oct-Sep Imports	0	3	0	0	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	5385	5188	7058	6856	6948	7486
TOTAL Mkt. Yr. Exports	0	0	0	0	0	0
Oct-Sep Exports	0	0	0	0	0	0
Feed Dom. Consumption	4420	4460	5470	5270	5580	6120
TOTAL Dom. Consumption	5085	5090	6110	5910	6240	6780
Ending Stocks	300	98	948	946	708	706
TOTAL DISTRIBUTION	5385	5188	7058	6856	6948	7486